

Presenting a Qualitative Study: A Reviewer's Perspective

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Abstract

Intended to guide scholars who are new to qualitative research, this methods brief focuses mostly on what reviewers look for in manuscripts submitted for publication. The author acknowledges that reviewers' preferences likely reflect their theoretical perspectives, research-oriented coursework, mentors, and research and writing experiences. The emphasis, therefore, is on terminology and basic elements that apply across a broad range of qualitative approaches. Discussion also addresses researcher inclinations toward qualitative inquiry; the importance of fit among approach, purpose, and research questions; the need for manuscript authors to identify potential researcher bias and explain how it was monitored; and the necessity of including and describing other elements that contribute to trustworthiness. Examples from journals in the field represent a wide range of research types, foci, and data sources.

Keywords

qualitative research, new researchers, researcher bias, approaches, trustworthiness

Qualitative research is no longer on the fringes of gifted education scholarship. Instead, the field is rapidly moving forward in that arena, with an increasing presence of qualitative studies in the literature, number and quality of manuscripts submitted, and conference presentations. Resources and models are changing (see Denzin & Lincoln, 2018), and though books and articles about qualitative methods from earlier decades still provide a sturdy foundation, innovation and new resources offer thought-provoking perspectives.

Purpose

The purpose of this methods brief is to offer guidance to scholars new to qualitative research as they consider undertaking a qualitative study or as they prepare manuscripts. The emphasis is not on how to conduct qualitative research; nor is the brief intended to reflect the perspectives of all who review qualitative manuscripts for *Gifted Child Quarterly*. Reviewers' preferences undoubtedly reflect their varied theoretical perspectives, coursework, mentors, and research and writing experiences. Accordingly, some of the views included here are based on my own experiences as a reviewer and as a longtime qualitative researcher responding to reviewers. However, the focus is generally on basic elements that should be included in manuscripts submitted for publication.

Researcher Fit With Qualitative Research

A particular personal or professional background is not required for conducting qualitative research. However, a

good fit of researcher with approach is usually advantageous. The researcher is the instrument of inquiry, the process is personal, and the

background, experience, training, skills, interpersonal competence, capacity for empathy, cross-cultural sensitivity, and . . . what you care about, how you view the world, and how you've chosen to study what interests you is [sic] a part of qualitative methodology. (Patton, 2015, p. 3)

Qualitative research typically involves direct personal experience, with the goal of depth of understanding of "externally observable behavior and internal states" in context (Patton, 2015, p. 56). This type of naturalistic research holds a personal appeal for some researchers (Roman & Apple, 1990).

My own nonlinear thinking tendencies and my interest in how people make sense of concepts and experiences led me to conduct an ethnographic dissertation on teachers' language when nominating children for a gifted education program—that is, how the teachers made sense of the term *gifted*. At that time, qualitative studies were not common in gifted education, and I needed "to go far afield to seek informed scholarly feedback" (Lancy, 1993, p. 244). Finding methodological experts outside of one's field continues to be common practice. Because of the relatively long history of

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qualitative approaches in other fields, researchers interested in studying giftedness qualitatively might seek guidance and social science perspectives from experts in disciplines such as history, sociology, and anthropology.

Subsequently, when my research questions fit other qualitative approaches, I conducted retrospective, longitudinal, case, or multiple case studies involving interview, archival, or open-ended questionnaire data. At times, scholars with quantitative inclinations reviewed my manuscripts. Some insisted on frequency counts for objectivity and certainty and challenged inductive, open-ended data analysis. Some objected to qualitative terminology (e.g., *findings* and *assertions*, *sensitizing concepts*, *central phenomenon* and *overarching theme*, *trustworthiness*, *inductive analysis*, *bias*, *emergent themes*). Fortunately, reviewers with expertise in qualitative approaches are now more available in the field, coinciding with increased research attention to the internal world of gifted children and adolescents and to previously unexplored contextual factors related to their learning and well-being.

In general, qualitative researchers venture into unexplored territory, make sense of participants' language and behaviors, make assertions based on findings, compare those with what exists in the literature, and suggest applications and new research directions. The cognitive work associated with qualitative methods differs from what is common with quantitative methods. The open-ended nature of the former probably appeals to scholars who embrace the notion that reality is socially constructed (Crotty, 1998). Patton (2015) summarized the contributions of constructionist perspectives to qualitative inquiry: "constructionists study the multiple realities constructed by different groups of people and the implications of those constructions for their lives and interactions with others" (p. 121). Related to the notion of multiple realities, Norum (2008) noted the emergent, malleable nature of qualitative research, with "not a set procedure that must be followed" (p. 739), and the biases researchers bring to the process. Crotty (1998) emphasized the role of culture in shaping an individual's view of the world. Patton (2015) also underscored an appealing practical dimension of qualitative methods: how "finding out what people do, know, think, and feel by observing, interviewing, and analyzing documents . . . can help answer concrete questions, support development, improve programs, and contribute to social change" (p. 170).

Qualitative researchers tend to be sensitive to language and not averse to writing. Tolerance for ambiguity, for "not knowing," and for not having clear, specific rules and templates for conducting qualitative research is helpful. A mindset of exploration, not of confirming or challenging existing theories, may lead to unexpected findings and new theories (see Strauss & Corbin, 1998). A willingness to accept that meaning is co-constructed by researcher and participant (Larkin, Watts, & Clifton, 2006) is also fundamental. An open-ended posture, with interest in perceptions, understandings, feelings, and experiences, can lead to insights and connections that excite both researcher and reviewer. Qualitative work can be labor-intensive; however, being comfortable

with the complex processes involved may lead not only to a satisfying experience but also to increased collaboration and efficiency. Reviewers and editors are likely to recognize and appreciate investment and perseverance, openness to reviewer feedback, and thoughtful responses to it. When a qualitative approach is a better fit than quantitative for purpose and research questions and when unexpected themes emerge, qualitative research can broaden the knowledge base and even breathe new life into scholarship in a field.

Concepts, Language, and Some History

Critics of the positivism that began in the early 1800s referred to the limitations and consequences of operationalism, determinism, and reductionism; of the assumption of a tangible reality with pieces able to be studied independently; and of the assumptions that the known is separate from the knower and that results are not influenced by value systems (Lincoln & Guba, 1985). Cronbach (1982) referred to verification and confirmation taking precedence over discovery. Elements of qualitative, naturalistic research (e.g., discovery-oriented, minimal manipulation, open-ended regarding outcome; see Guba, 1978) are the reverse of what positivism embraces. Distinguishing features are important to keep in mind.

During the 1970s and 1980s, especially pertinent to some concerns addressed in this research brief, "alternative approaches emerged, creating competition and confusion, the legacy of which remains in the daunting jargon and labels of qualitative perspectives" (Patton, 2002, p. 79). Among these are *constructionism*, *deconstructionism*, *critical theory*, *neopositivism*, and *phenomenology*. The language a researcher uses is important because it reflects a paradigm and a worldview (Jones, Torres, & Arminio, 2014). Guba (1981), an early advocate of qualitative methods, therefore proposed replacing terms denoting conventional (quantitative) criteria for rigor with *credibility* (for *internal validity*), *transferability* (for *external validity*), *dependability* (for *reliability*), and *confirmability* (instead of *objectivity*). The phrase *thick description* refers to a sufficient amount of narrative detail to make observed contexts vivid enough that readers feel that they experience, or could experience, the events described (Denzin, 1989). Such description, especially in ethnographic studies, helps readers understand and consider the transferability of findings to similar situations. However, the amount of description deemed adequate varies, depending on the importance of context to data gathering and to findings. Length constraints usually caution against excessive text related to setting, behavior, and interaction. In general, however, "sensitivity to context is a strength of qualitative inquiry" (Patton, 2015, p. 362).

Trustworthiness

The hallmark of high-quality qualitative, naturalistic research is *trustworthiness*, typically viewed as the counterpart to *rigor*, *validity*, and *credibility* in conventional quantitative

research. However, Hunt (2011) argued that these are not similar, parallel terms: “the frame for gaining knowledge is different in qualitative and quantitative research” (p. 297). Because purposes also differ, with the former focused on understanding and relationships and the latter on control of prediction (Denzin, 2011), criteria for judging quality must reflect those purposes (Callahan & Moon, 2007; Morrow, 2005).

One distinguishing characteristic of qualitative methods is the emphasis on *inductive* strategies for theory development instead of logical deduction based on a priori assumptions. Findings *emerge* through the researcher’s immersion and interaction with, and becoming grounded in, the data, at least in the early stages of analysis (Patton, 2015). Pertinent to what these differences reflect and to some scholars’ resistance to a shift in thinking about what constitutes high-quality research, Patton (1978) wrote that paradigms, or worldviews, involve unquestioned assumptions “deeply embedded in the socialization of adherents and practitioners: paradigms tell them what is important, legitimate, and reasonable” (p. 203). Later, Patton (2002) referred to six core aspects of what scholars view as trustworthiness and rigor: what they believe about the nature of reality, how they know what they know, what is worth studying, what is worth knowing, questions they should ask, and how they should engage personally in inquiry.

Reviewers of qualitative manuscripts expect to see a description of strategies to ensure trustworthiness within the model or approach being used (e.g., Cross, Stewart, & Coleman, 2003; Eddles-Hirsch, Vialle, McCormick, & Rogers, 2012; Wood, 2010). They also expect to see appropriate terminology—*trustworthiness* instead of *rigor*, for example. In addition to elements also common to quantitative studies and named similarly (i.e., purpose, research questions, pertinent literature, data analysis, results/findings, discussion, implications for practice, directions for future research, and conclusion), reviewers are likely to check to see if basic tenets of qualitative practice were applied throughout the study. In most of the remainder of this research brief, I discuss aspects associated with trustworthiness (e.g., rationale, descriptions of data and data gathering, evidence of understanding the coding process, triangulation, and interview protocol).

Acknowledging and Monitoring Researcher Bias

Because they themselves are a research instrument (Morrow, 2005), qualitative researchers need to be transparent about their connection to the phenomenon studied so that readers can draw conclusions about potential researcher influence on participants and processes (Hunt, 2011). Manuscripts should include acknowledgement of personal biases (i.e., conscious and unconscious inclinations or preferences that inhibit objective judgment) at all stages of the research. Identifying personally with participants’ race, ethnicity, geography,

family struggles, abilities or disabilities, or having a vested interest in outcomes, for example, can bias researchers positively or negatively. Being reactive to participants’ narratives because of similarities to their own experiences and seeing themselves reflected in interviewees can likewise affect interactions, follow-up questions, and data analysis. Patton (2015) referred to “empathic neutrality” (p. 570) as a goal: not too close to the participant, but also not too distant. The researcher should therefore describe the “what” (e.g., theories, assumptions, understandings, beliefs, or prejudgments based on personal experiences) and the “why” (i.e., setting aside and suspending judgment and assumptions; see Jones et al., 2014) of *bracketing* and how self-monitoring occurred during the study (e.g., a research log or journal, or regularly debriefing with someone not involved in the study and able to recognize bias). The following are two examples from gifted education journals of acknowledging and monitoring potential bias:

- Jen (Jen, Gentry, & Moon, 2017), recognizing that her having codesigned the curriculum being studied could incline her researcher behaviors toward positive findings, avoided working directly with the students; consulted frequently with advisors, who did not collect data (Merriam, 2002); and wrote theoretical memos during initial data analysis to reflect on her thoughts and potential biases (Corbin & Strauss, 2007).
- Potts (2019) taught at the school where her study of profoundly gifted students’ experiences with virtual classrooms was situated. Because she recognized potential power issues, she carefully emphasized the voluntariness of participation with both students and parents and reassured them that involvement would not affect student status. Bracketing involved setting aside her research-based and practical understanding of how such students learn so that she could be open to learning how the students experienced the virtual classroom.

Rationale for Qualitative Methods

One essential manuscript element is a rationale for using qualitative methods—that is, a clearly articulated justification for observing behaviors, examining documents or audiovisual material, or using open-ended interview questions or questionnaire items. However, regardless of rationale, if data were analyzed and findings presented in ways that resemble quantitative studies, and if quantitative methods would likely have accomplished as much or more, a reviewer justifiably might question the use of a qualitative approach.

Table 1 presents examples of qualitative studies in the gifted education literature, selected to represent a variety of foci and approaches as well as a range of foci within some approach categories. The third column presents a truncated research question for each study. The language in the questions reflects

that many of the studies were phenomenological, exploring how a phenomenon was experienced in context, often in a school. All of the studies were appropriately qualitative in design. The table illustrates why this brief does not provide firm, universally applicable guidelines for preparing qualitative manuscripts (see Jones et al., 2014). Both rationale and presentation of findings, for example, are likely to differ according to purpose, research questions, and approach. The table is not intended to assess quality of each study, but instead to raise awareness of the wide range of worthy approaches and foci in the field.

Related to rationale, scholars no longer need to be defensive about using qualitative research methods: "The methods of qualitative inquiry now stand on their own as reasonable ways to find out what is happening in programs and other human settings" (Patton, 2002, p. 137). Nevertheless, reviewers are alert not only for a clearly articulated rationale for using a qualitative approach and for the fit of method with research questions but also for evidence that the researchers understood the cited philosophy, theories, and resources. Because readers vary in familiarity with qualitative research, authors should succinctly explain terminology related to qualitative work, the approach, and the study being presented (e.g., *grounded theory*, *phenomenology*, *content analysis*, *ethnographic*, *narrative*, *inductive*, and *constant-comparative*) and should include appropriate citations.

Pertinent Literature

Theoretical Perspective. Discussion of theory in qualitative research may include the phrases *theoretical perspective* (i.e., "philosophical assumptions that guide methodology"; Jones et al., 2014, p. 10), *theoretical lens* (i.e., "theoretical traditions and current thoughts for framing the question"; Creswell, 2013, p. 63), and *theory-based sampling* (i.e., sampling based on potential representation of theoretical constructs, Patton, 2015), among several phrases related to theory. Given the emphasis on *inductive* theory development in qualitative research, it is not surprising that textbooks typically do not have *theoretical framework* listed in an index.

For many qualitative researchers, the phrase *theoretical framework* is a poor fit with the exploratory, inductive, and constructivist aspects of qualitative research emphasized in textbooks. However, some researchers may perceive that using a theoretical framework (i.e., to create interview questions, foci for focus groups, or categories during data analysis) is important for credibility with funding agencies and during evaluation for promotion. As a reviewer, I have observed that applying a theoretical framework a priori can result in finding what one looks for; missing opportunities to explore aspects that can emerge unexpectedly through open-ended interview questions without a particular theoretical framework; and not generating complexity, depth, and new research directions. However, because some reviewers in the field do embrace using a theoretical framework to guide

qualitative studies, briefly explaining the decision to use or not use such a framework may be wise.

Jones et al. (2014) noted that although a *theoretical perspective* (e.g., constructivist, critical, feminist, and intersectionality) is not essential in qualitative research, it can connect a researcher to "epistemological views and theoretical perspectives that inform how one might investigate a particular phenomenon" (p. 69). Glesne (2011) wrote, "Part of your duty as a researcher is to figure out what philosophical and theoretical perspectives inform the kind of work you choose to do" (p. 5). For example, Jen et al. (2017) and Tomlinson and Jarvis (2014) applied Yin's (2008) perspectives about multiple case studies, and the latter researchers applied Stake's (1995) perspectives about critically examining a generalization or specific issue. Wood's (2010) phenomenological study was rooted in an interpretivist paradigm (Rossman & Rallis, 2003). Depending on approach, researchers may apply theory before gathering data, at the midpoint, or after data collection (Creswell, 2013). In a manuscript, authors should indicate which, if any, theoretical perspectives informed the study.

Sensitizing Concepts. *Sensitizing concepts*, which alert the researcher to watch for something during fieldwork, reflect that researchers do not begin with a blank slate (Patton, 2015). Rather, they peruse extant literature to become acquainted with pertinent theories and concepts, to determine gaps, and to consider protocols. They might then bracket these as sensitizing concepts until data gathering and analysis have been completed so that they do not limit open-endedness in interviews and data analysis. Authors can briefly describe this process. Ideally, something thought provoking and new emerges through open-ended, exploratory processes, clearly a goal when applying grounded theory (McLeod, 2011), but also applicable to other qualitative approaches.

Newly Salient Literature. When research is genuinely open-ended and exploratory, the relevance of literature cannot be fully predicted at the outset. Authors can include literature that became newly salient during the study either after other literature at the outset of a manuscript, with appropriate explanation of when it became relevant, or in the discussion section. Regardless, they should identify it as additional pertinent literature. Separating it can add to the trustworthiness of the work because the additional literature presumably did not steer the research process (e.g., when creating an interview protocol or open-ended questionnaire, or during data analysis).

Participants

Purposive Sampling. Qualitative researchers use *purposive* or *purposeful sampling*, seeking information-rich cases with potential to generate insight about the phenomenon being

Table 1. Representative Qualitative Studies in the Gifted Education Field

Approach	Example	Focus
Case study	Hébert and Beardsley (2001)	Role of a rural poverty environment in developing gifts of a Black child
Multiple case study	Hertzog (2003a)	Which factors affect advocacy in a school district
	Hébert (2002)	How achieving Black students experience a predominantly White university
	Coleman and Guo (2013)	The experience of living with a passion for learning in six domains
	Tomlinson and Jarvis (2014)	How low-income, ethnic minority students and environment interact in schools successful with talent development
	Zabloski and Milacci (2012)	How gifted dropouts make meaning of life experiences prior to leaving
Retrospective interview and/or questionnaire study	Potts (2019)	How profoundly gifted students experience virtual classrooms
	Hertzog (2003b)	College students' past experiences with programs for gifted students
	Peterson and Rischar (2000)	How GLBT students experience school and development
Longitudinal study	Jen and Moon (2015)	How graduates with STEM talents experience a gifted program
	Peterson (2002, 2014)	How high-risk gifted individuals experience developmental tasks
Ethnographic study	Hébert (2019)	How exceptional leadership talent develops
	Coleman (2001)	How gifted students experience a public residential school
In-depth interview study	Peterson (1999)	Which cultural values emerge when nominating gifted persons
	Hébert (2018)	How high-achieving, first-generation, low-income students develop and manage university life
	Speirs-Neumeister (2004)	Factors contributing to two dimensions of perfectionism during college
Phenomenological interview study	Samardzija and Peterson (2015)	Learning and classroom preferences of gifted eighth graders
	Cross, Stewart, and Coleman (2003)	What characterizes elementary magnet students' <i>Lebenswelt</i>
	Wood (2010; interview and questionnaire data)	How school counselors experience working with gifted students
Classroom-based study	Linn-Cohen and Hertzog (2007)	What daily teaching practice is in two self-contained classrooms
	Mun and Hertzog (2018)	How students experience a STEM program outside of school
	Wang, Kedem, and Hertzog (2004)	How students experience a child-created project curriculum
Program-evaluation study	Jen, Gentry, and Moon (2017)	The experience of an affective curriculum in a summer program
Cross-sectional questionnaire study	Peterson, Canady, and Duncan (2012)	How positive life events are experienced by gifted youth
Mixed-method study	Gentry, Steenbergen-Hu, and Choi (2011)	Role of exemplary teachers in the development of talent

Note. GLBT = gay, lesbian, bisexual, and transgender; STEM = science, technology, engineering, and mathematics.

studied (Jones et al., 2014). In the methods section, researchers should describe participants in sufficient detail (e.g., ethnicity, cultural context, education, age, and level of ability) that readers can judge whether the sample was appropriate for the purpose of the study.

Pseudonyms. If pseudonyms are used, authors should include a rationale for using them. With a large number of participants, pseudonyms are usually not useful. However, using pseudonyms can help the reader if fewer than 20 are involved (e.g., Peterson, 2002), if each participant is likely to be

quoted more than once, if distinguishing among participants is important for nuanced understanding, and if identifying the speaker of each direct quotation is important for understanding how a phenomenon was experienced.

Number. All studies need enough participants to capture nuances of how a phenomenon is experienced. However, Hunt (2011) argued that, instead of sample size, the focus in manuscripts should be on how and why participants were selected and on the length and depth of interviews. Nonetheless, reviewers are usually interested in the rationale for the number of participants, how the researcher accessed them, and the logistics of recruitment. Qualitative research textbooks offer specific minimum participant numbers only rarely, instead underscoring that an effective number varies according to purpose, questions, and design.

Patton (2015) noted that a minimum for “expected reasonable coverage of the phenomenon” can be included for the sake of budget and planning, but the design “should be understood to be flexible and emergent” (p. 314). Creswell (2013) noted wide-ranging numbers in published studies, but emphasized that the goals in qualitative studies are depth and detail, not generalization. Among his general guidelines were 4 to 5 participants in case-study research, 20 to 30 in a grounded-theory study, and multiple sources (e.g., within a cultural group) in ethnography. Based on my own experiences, recruitment numbers also vary with the type of data (e.g., observations, interviews, and student essays), likelihood of response (e.g., if parental permission is required), and circumstances (e.g., rarity of the phenomenon, travel required for face-to-face interviews after online recruitment, and anticipated attrition in a longitudinal study). Published studies of populations difficult to access may offer specific strategies for accessing these populations (e.g., Ritchotte & Graefe, 2017).

Reviewers are interested in details of sampling strategies and procedural changes, both of which authors should describe briefly. Focusing on a small number of carefully selected, information-rich cases is common in qualitative studies, with the goal of maximizing opportunities to generate data relevant to the purpose of the study (Jones et al., 2014). The sampling process (Creswell, 2013) might be conducted, for example, through purposeful (i.e., participants have experienced the phenomenon), criterion (i.e., participants meet a criterion), snowball (i.e., contacts know of information-rich cases), or intensity (i.e., participants manifest the phenomenon intensely). Regardless, instead of a sample size fixed in advance (Patton, 2002), an emergent-sampling or a staged-approval strategy might be appropriate when the full design cannot be anticipated at the outset of participation. An example of differing *recruitment* and *participant* numbers is Coleman and Guo’s (2013) study, which began with 20 nominated children, who became 10 after initial screening and then became 6 when 4 did not meet precise criteria. Six was an appropriate number for this study. When

researchers contemplate sample size, they should realistically consider that these types of changes may occur after recruitment and should therefore describe them clearly.

Relatively large numbers of interviewees are not uncommon. In an interview study of bullying (Peterson & Ray, 2006), participants were 57 gifted adolescents in six U.S. states, averaging several voices from each of those states. A researcher and assistants interviewed all 101 volunteers in a summer residential program (Jen et al., 2017) to ensure that cultural, national, and socioeconomic differences were adequately represented. Sometimes a relatively large number reflects both access and the anticipation that more data will help answer the research question or understand a complex phenomenon (e.g., 50 college students retrospectively discussing their experiences with programs for gifted students [Hertzog, 2003b]; 55 classroom teachers nominating students for a gifted program and justifying their nominations [Peterson & Margolin, 1997]).

Saturation. Textbook authors (e.g., Creswell, 2013; Lincoln & Guba, 1985; Patton, 2015) are likely to mention sample size in connection with having enough participants to reach saturation, or redundancy. At that point, information has become repetitive, new themes are not likely to emerge with additional participants, and data gathering can cease. Depending on the type of study and whether saturation is pertinent, manuscript authors should explain briefly how and when they determined saturation. In studies focused on complex phenomena that are difficult for participants to talk about, it may be wise to continue interviewing beyond saturation because one or more articulate, insightful interviewees may yet appear, contributing rich and different data.

Interview Protocol or Questionnaire

If a questionnaire (e.g., asking for narrative responses) or interview protocol was used to gather data, the document’s text should be included either in the body of the manuscript or as an appendix. Reviewers can then judge whether the interview questions or questionnaire items (beyond those asking for demographic information and qualifications for participation) were generally open-ended (e.g., beginning with *how*, *what*, *where*, *when*, *what kind of*, or *tell me about*) rather than dichotomous (e.g., beginning with *do*, *did*, *is*, *are*, *was*, *were*, *has*, *had*, or *have*, which are likely to elicit *yes* or *no* responses), and can verify that they were not inappropriately “leading” (e.g., How does being smart affect your popularity? What kinds of problems do you have with teachers?) or based on assumptions (e.g., What experiences at home contributed to your child’s interest in art? How did your family’s insecure financial circumstances affect your academic performance?). Providing only selected questions might suffice when describing a long questionnaire, but the complete questionnaire is advisable if space allows (e.g., Samardzija & Peterson, 2015). Regardless, Patton (2015)

cautioned against having a long, unfocused “laundry list” of questions (p. 253).

Description of Data

The methods section should include a clear description of the type of study, the strategies used for data gathering, and perhaps the amount of data ultimately collected for analysis (e.g., approximate number of e-mails; number of single-spaced pages of interview responses or group discussion transcripts). Knowing the amount may help reviewers ascertain trustworthiness of findings. The average duration and range of duration of interviews and amount of data per participant might also be helpful. When observations are part of data gathering, the contexts need description, as well as some indication of the duration of the observations and whether observation protocols were general or detailed. Fundamentally, authors should provide enough detail about the context, participants, and methods to allow other researchers to replicate the study.

Depending on how and when data were gathered and whether variations in context might have affected responses, providing information about quotations in the methods section or at the outset of findings can be more efficient than later adding location, time, day, format, or similar information in parentheses after each quotation. If all interviews were conducted in a conference room at school over 1 month, or by phone over 3 months, for example, including that information in one sentence in the methods section might suffice. If all participants were female eighth graders in the same school (referred to with a pseudonym) in one city, I recommend the same. However, information in parentheses at the end of quotations is warranted if timing or other contextual factors of interviews might have affected responses; if participants were each interviewed multiple times and interviews must therefore be numbered; or if age, gender, or context varied.

If development is the focus in a longitudinal study (e.g., Peterson, 2014), age might suffice after each of several brief quotations, arranged in chronological order in one indented segment—or simply included in order in a paragraph, with age for each in parentheses. In addition, if difficult-to-access adult participants were interviewed whenever they became available over a few years (e.g., Peterson, 2001), and if the focus was on a life event or developmental stage, responses probably would not have differed had all participants been interviewed during just 1 week. For example, in a retrospective look at Grade 6, regardless of current interviewee age, perspectives will be related to Grade 6, with probably no need to include current age, especially if the age *range* of participants was noted earlier. In a study of current experiences, with age varying, noting age or grade level after each quotation might be important. The methods section should provide a rationale for including or not including these kinds of parenthetical information after quotations.

Data sources differ according to the type of qualitative study, and authors should briefly describe these sources. In a multiple case study (Tomlinson & Jarvis, 2014) exploring the academic success of ethnic minority and economically disadvantaged students, the units of analysis were two schools and a small group of teachers in another school. Data came from interviews, focus groups, and school documents. For the 15-year qualitative longitudinal case study of the development of the gifted female who had experienced trauma (Peterson, 2014), mentioned earlier, data were e-mail messages; saved personal journals and school essays; and interview responses from her, her husband, some friends, a teacher, and her mother—approximately 1,000 pages. For a multiple case study of five gifted Black achievers (Hébert, 2002), observation, interviews, and archival material provided data. In a retrospective study of 18 gifted gay, lesbian, bisexual, and transgender young adults (Peterson & Rischar, 2000), rich data came from a 10-page paper questionnaire, in which half of the questions offered a large space for narrative responses. In each of these varied examples, complex data yielded unexpected themes.

Data Analysis

Evidence of Understanding. Data analysis involves conceptual ordering (Strauss & Corbin, 1998). Reviewers look for evidence that authors understood the data-analysis approach and provided more than a perfunctory description of the process, including when data came from multiple sources and were analyzed differently. Citing one or more of the resources that guided qualitative data analysis is appropriate. Authors should also explain how coding was conducted, with at least one example of how coded elements and consensus led to major and minor themes. Examples of progression from open to axial coding follow here, the first from Peterson, Duncan, and Canady (2009) when analyzing responses to a question about “most stressful events and challenges”: *Isolation, abandonment by a friend, a close friend contemplating suicide, a friend with an eating disorder, social awkwardness, and trying to fit in* became the theme *peer relationships*. *Parental alcoholism, troublesome relatives, parental divorce, and loss of trust* became the theme *family*. Brief quotations represented each of these themes. In a second example, Jen et al. (2017) reported that four open codes (i.e., *we hung out outside of the group, we acted like a team, we kept talking about these topics, and we knew each other in depth*) became this axial code: *Students perceived that the small-group discussions influenced their interaction with their group members positively*.

Qualitative Software. Pertinent to data analysis is the use of computer software in qualitative research. As with other strategies, reviewers expect a rationale for utilizing it. Because functions need to fit the research approach and because researchers’ ability to operate the software is essential, some

explanation of which program and functions were employed, and why, can assure reviewers that authors used the software capably. For example, Miles and Huberman (1994) encouraged researchers in multiple case studies to identify various attributions of participants and then search for patterns accordingly. If researchers know how to direct it, software can search for patterns efficiently. In general, reviewers appreciate a brief description of coding, with an example, and, if language units were coded by multiple team members, a description of how they came to consensus about codes and themes.

Software can be useful for organizing, reorganizing, managing, and storing large amounts of data and for facilitating communication among research team members. It can create and relocate a visual display of codes and themes and generate reports and summaries. However, as with hand coding, it does not guarantee high-quality qualitative work—especially if it replaces careful data analysis. Patton (2015), discussing inductive analysis, noted that the analyst returns repeatedly to the data as themes and an overarching concept emerge. Use of software should not preclude that kind of continual contact with observations, transcripts, documents, and notes. As with any other approach to analysis, reviewers expect some details about how data were organized and processed.

Focusing on the meaning of various elements is important. Insights can happen when themes interact and mesh because of nuanced meaning and context, not necessarily because of frequency or similarity of language elements. For example, in a hypothetical phenomenological study, an interviewer might ask 10 participants open-ended questions. With an open-ended interview protocol and careful attention to meaning of responses, an important theme might emerge from the responses of just three of the participants if such similarity of meaning is judged unlikely to emerge without a prompt in that direction. One such insight might suddenly illuminate connections that would be missed in software-organized language.

Overarching Theme or Central Phenomenon

Many published qualitative studies do not identify the main theme, sometimes referred to as the underlying pattern (Glaser, 2000) or central phenomenon (Creswell, 2013), which may be presented in a single, efficient statement that reflects the study's most salient themes and assertions. Determining an overarching, underlying, or central theme or pattern usually requires extensive contact with the data and, as such, it may not emerge until after other findings have been thoroughly considered. As a reviewer, I do appreciate and expect to see such a foundational statement. An example of a central phenomenon, from the study of how a gifted individual experienced trauma, is that giftedness can be both asset and burden in the midst of personal struggle (Peterson, 2012).

Triangulation

Various other strategies can enhance trustworthiness of data, analysis, and findings. Several elements are associated with triangulation, the purpose of which is to test for consistency: utilizing differing data sources (e.g., a case study participant's friends, parents, and teachers), more than one data collection method (e.g., interviews, observations, and school records), mixed research approaches, multiple data analysts, and multiple perspectives or theories when interpreting data (see Patton, 2015). Having more than one person involved with data analysis in a qualitative study helps diminish the effects of researcher bias and thereby supports the credibility and trustworthiness of findings. Using mixed methods reflects the assumption that "multiple approaches can generate more complete and meaningful understanding of complex human phenomena" (Greene, 2007). Some reviewers might view examples of how quantitative strategies did or did not support interview findings as adding credibility. However, it should be noted that when quantitative methods are used to confirm or validate qualitative findings, the former often are privileged in a positivist sense, intended to provide objectivity, validity, and generalizability (Crotty, 1998). With mixed-method approaches, such privileging of quantitative methods also might convey disregard for the unique value and sufficiency of qualitative studies.

Legal and Ethical Concerns

In interview or observation studies, regardless of the length or number of interactions, the qualitative researcher has legal and ethical responsibilities related to the researcher-participant relationship. Generally, but especially when interviews involved sensitive topics, the methods section should include how the interviewer proactively addressed safety and privacy concerns. For example, interviewers should explain caveats to confidentiality at the outset of a discussion group, focus group, or interview (e.g., if the interviewer has reason to believe that a participant is in danger or is a danger to self or others or that a young or elderly person is being abused or neglected), and provide referral information (e.g., in case of distress during interviews).

Findings and Assertions

Findings in qualitative studies can be in the form of major and minor themes, subthemes, and observations (with past tense verbs indicating "at that time") and assertions based on findings (i.e., meanings that can be stated with confidence, using present tense verbs). Findings and assertions should be related to the research questions. Findings unrelated to the original research questions might be worth reporting, but the author should state clearly that they are unrelated. For the sake of keeping length reasonable, authors must often make decisions about how many, and in what depth, themes and

assertions are presented. A recurring perspective (not necessarily a repetition of particular words) is probably a theme. An eloquent comment on another topic by only one of several participants is not.

Fundamentally, presentation of findings, assertions, and implications should not “go beyond the data,” claiming more than is warranted, overstating findings or their potential application, or seeming to preach with inappropriate confidence about implications of findings. Authors should also avoid hyperbole (i.e., passionate or exaggerated presentation of findings or implications) and should not editorialize (e.g., giving a personal opinion about a quotation). Reviewers expect straightforward presentation of findings.

Quotations: Many Voices

Multiple participant voices attest to the credibility and trustworthiness of emergent themes. Quotations should be adequate in number and representative of the range of participant voices, the complexity of the findings, and some nuances of the phenomenon studied. Instead of using one long quotation to represent a theme, multiple shorter quotations can be stacked and indented or embedded in a paragraph to more effectively convey complexity and nuance. One quotation of several lines may sometimes seem to express a theme “best,” but if only one is incorporated, it should also reflect the breadth and depth of the theme.

Ellipses points can replace nonessential sentences or phrases in quotations without sacrificing meaning. Efficient presentation of quotations adds richness without straining length limits.

Transferability

Cronbach (1975) wrote, “When we give proper weight to local conditions, any generalization is a working hypothesis, not a conclusion” (pp. 124-125). When presenting qualitative studies, authors often include a statement cautioning against generalizing findings. However, according to Hunt (2011), generalization should not be listed as a limitation because it “is not relevant to qualitative research; rather, transferability is germane” (p. 299). Reflecting the concept of *transferability*, Eisner and Peshkin (1990) observed that “naturalistic generalization” (p. 208) allows credible findings to be applied to similar situations. Phrases like “according to these adolescents’ experiences” or “based on concerns expressed by these children,” referring to life experiences or perspectives revealed through interviews or questionnaires, are appropriate in the discussion and implications sections. It is the responsibility of the person wanting to apply findings elsewhere to determine if there is sufficient empirical evidence of similarity and congruence of context (see Lincoln & Guba, 1985). It is the responsibility of the researcher to provide enough information about context, participants, data gathering, and data analysis to guide other scholars in generally

replicating the study. Besides helping to make contexts vivid, the thick description described earlier in this article may also support transferability of findings.

Trustworthiness in qualitative research does not mean an absence of ambiguity. Various research methods can be employed to better understand complex phenomena, but qualitative scholars are likely to argue that no method can claim “truth,” regardless of how reliable instruments are, how samples are chosen, and how large samples are. However, what a qualitative researcher explains and which examples are given can contribute to the credibility of findings, which then might be deemed transferable. Qualitative findings can inform quantitative assessment and research when the process was genuinely exploratory, driven by curiosity and need, and employed appropriately—and when researchers pay careful attention to basic elements of trustworthiness.

Writing Well

Besides an effective, appropriate, and substantive presentation, reviewers appreciate well written manuscripts. Careful writing is important when presenting findings from any study. With qualitative studies in particular, clarity is crucial when explaining complex concepts, processes, findings, assertions, insights, perspectives, and new theory. Qualitative manuscripts are also usually in narrative form, with cohesion and fluency contributing to reader comprehension. In general, authors should not assume that reviewers will ignore poor-quality writing even when findings are noteworthy. Wordiness and problems with writing mechanics can affect reviewers’ understanding and evaluative judgment.

Authors of qualitative manuscripts may struggle with page limits because (a) they need to describe recruitment processes, procedures, contexts, and data sources in depth; (b) including examples of coding elements helps to show how themes emerged; and (c) reviewers anticipate encountering more than just a few direct quotations in interview or narrative questionnaire studies. In general, journal editors may or may not be flexible about length; however, *Gifted Child Quarterly* does have some flexibility in this area. Authors wishing to submit a manuscript exceeding 36 pages should ask for guidance by e-mailing GCQuarterly@gmail.com prior to manuscript submission. *Gifted Child Quarterly* also encourages authors to provide appendices and other lengthy supporting material as online-only supplements on publication. The journal additionally offers badges (see the recent editorial by Adelson & Matthews, 2019) for articles whose authors provide open access to materials or de-identified raw data from their study through an online supplement or archival site.

Regardless, all manuscripts can usually be “tightened” somewhat after they are written. Cutting out phrases, artfully using phrases instead of clauses, and restructuring unclear or meandering sentences can be a start. Checking every long sentence to see if it “loses itself,” or is unnecessarily repetitious is a good next step. Good writers are not afraid to move a phrase

to a more appropriate place in a sentence (e.g., closer to what it describes) for the sake of clarity and cohesion. Manuscript authors need to determine what is essential (e.g., addressing the research questions) and what is dispensable (e.g., unrelated to the research questions). In addition, findings are not all equally important. Perhaps whole paragraphs can be cut.

Whole qualitative studies are often difficult to prepare for journal publication. Sometimes only one or two “slices” of a complex study are sufficient for a manuscript. Particularly when a multifaceted qualitative dissertation or longitudinal study is to be transformed into a journal manuscript, the author might consider splitting the study into two manuscripts, one geared to just the central phenomenon and the other to emergent themes with major implications for education, for example—if the findings warrant such a division (e.g., Peterson, 2012, 2014). In the second manuscript, a brief summary of findings presented in the first manuscript can be given at the end of the initial section. However, drastic shrinking of text is likely necessary and inevitable in both manuscripts.

Conclusion

By considering the information offered here, novice qualitative researchers, as well as advisors and reviewers, can become more conversant about basic elements of qualitative research and more aware of what should be provided in journal manuscripts to demonstrate trustworthiness. The examples included here of qualitative studies related to giftedness represent a wide range of approaches, foci, data sources, and numbers of participants. Foundational resources from past and recent decades offer guidance. Researchers who invest in thoughtfully designed qualitative projects can have the satisfaction of exploring new territory and strengthening the knowledge base in the field of gifted education.

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